

# **Chapter 7 - Holds**

# Overview of Holds in Evergreen Indiana

There are four types of holds in Evergreen Indiana. Holds may be placed by library staff via the Staff Client or by patrons via the OPAC. A patron may have up to 20 unfilled holds in the system at one time.

• User group profile, circulation modifier, age protection and the pickup location designation may affect the ability of a patron to place a hold. Attempts to place improper holds will generate a popup customer service message which gives the patron reasons why they were unable to complete the hold.

# How holds are filled

Items are captured to fill holds based on proximity. The system seeks to minimize transit time by capturing the item and assigning it to the nearest patron on the hold list. The nearest patron may not be person who has been on the hold list the longest. The system will continue to seek to fill holds with other items.

#### **Minimizing Transits**

- Sally places a hold on December 1; John places a hold on December 10; and Dewey places a hold on December 15.
- Sally and John have designated Thorntown as the pick-up location. Dewey designated Westfield as the pick-up location.
- On December 20, a patron at Westfield returns the item. The item is captured for Dewey even though he placed hold at a later date because the item will not need to transit to fill the hold. The system will continue to search to find items to fill the hold requests for Sally and John.

#### Fulfilling the oldest hold

- For example, Sally places a hold on December 1; John places a hold on December 10; and Dewey places a hold on December 15.
- Sally and John have designated Thorntown as the pick-up location. Dewey designated Westfield as the pick-up location.
- On December 20, a patron at Mooresville returns the item. The item is captured for Sally and will be transited to Thorntown. The system will continue to search to find items to fill the hold requests for John and Dewey.

### **User Groups and Holds**

A patron's user profile group determines the scope of the patron's ability to place holds.

- Residents, non-residents, PLAC, outreach, temp and staff user profiles have full access to the consortium and may place holds on any library's materials.
- Reciprocal borrowers and student profiles have access only to the member library that issued the library card. Reciprocal borrowers and student user groups may place holds only on the materials owned by the library that issued the library card.

#### Items that do not Transit

- Items with the following general circ modifiers do not transit between the libraries: art, dvds and videos, cd-music, equipment, media, realia, software gaming and special collections.
- Evergreen will deny an attempt by a patron to place a hold on an item that does not transit if filling the hold would cause the item to transit to another library.
- The staff client will override this—so staff need to be aware of the consortium rules that only books, audiobooks, kits and magazines can be transited.
- Patrons may and December 29, 2009 place a hold pick up an item from the owning library.

#### Patron Types and Holds

- Circulation modifiers determine "who" may place a hold. Although local library patrons may place holds on items owned by the local library, consortium patrons may not place holds on those items with circulation modifiers that do not transit.
- There is one exception: matching the pick-up library to the owning library when placing the hold will allow the hold to be placed.

#### Patron holds on DVDs to transit

• Example One: Adams Library owns "Snow Bear" on dvd. Adams Library's local patrons may place a hold on this item. A hold by a Kendallville Library patron on the dvd with the selection of Kendallville as the destination pick-up library will be denied by Evergreen because the hold would cause the item to transit.

#### Patron holds on DVDs for pick-up

• Example Two: Adams Library owns "Snow Bear" on dvd. A Kendallville Library patron places a hold and designates Adams Library as the pick-up library. This hold will be allowed because the filling the hold does not require the item to transit. The patron is assured the item will be available when she arrives to pick it up. The patron is allowed to return the dvd to any member library to transit back to Adams Library.

#### Age Protection and Holds

- Six-month age protection of new items prevents holds from being filled for other than local patrons. The hold shows as accepted/placed, but the hold will not be filled for the non-local patron until the item's age protection has expired.
- If the patron's home library purchases the item and also age protects it, the patron's hold can be filled by his home library.
- This is why it is in the best interest of the patrons to only place holds at the Title level\*—not the copy level.

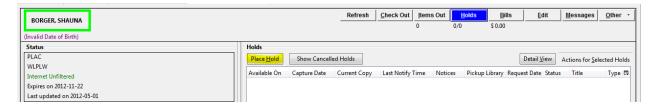
# The Four Types of Holds

• Evergreen has four different types (levels) of holds. Library staff may place holds at all four levels. Patrons may place only meta-record and title level holds. The chart below summarizes the differences among the hold types:

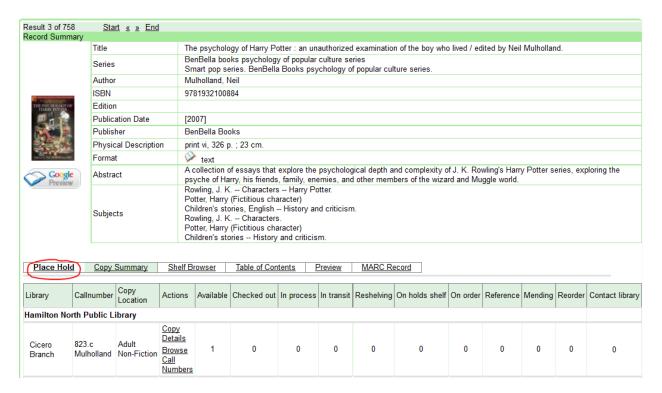
Hold Type	Abbreviation	When to Use	Who Can Place	Hold Captures
Meta-record	М	Format type doesn't matter.	Patron or staff	All items on MARC records sharing the same title regardless of format.
Title	Т	Patron wants the first available copy of the title.	Patron or staff	All holdings attached to a single MARC record.
Volume	V	Patron wants a specific volume attached to a particular call number.	Staff	Call number specific volume record.
Сору	С	Patron wants a specific copy of an item.	Staff	Item based on barcode.

### Meta-record Level Holds - Staff and Patron

• Step 1: To place a "meta-level" hold that will capture all items that share the same title regardless of format, patron logs into My Account or staff member pulls up patron record.



- Step 2: Search and retrieve the item in the catalog.
- Step 3: Click on Place Hold below the item record.



• Step 4: Click the Advanced Hold Options button. Select acceptable formats and click Place Hold button. Confirm action on the pop-up window.

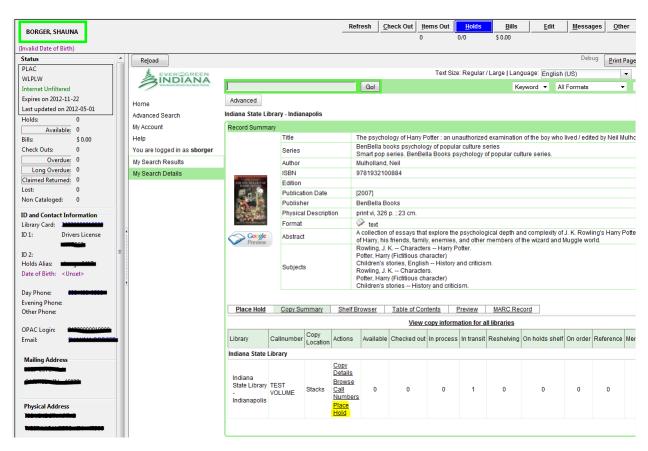
Create / Edit a Hold				
Recipient:	Borger, Shauna			
Title:	Harry Potter and the deathly hallows			
Author	Rowling, J. K.			
Format	Books			
Physical Description:	print 969 p.(large print); 23 cm.			
Contact telephone number:	317-234-6536 (XXX-YYY-ZZZZ X123)			
Enable phone notifications for this hold?	✓			
Contact email address:	(Patron has no configured email address) (See My Account for setting your email address)			
Enable email notifications for this hold?				
Pickup location	Indiana State Library - Indianapolis			
Expiration date	3/8/2013			
Suspend this hold (Help)				
Advanced Hold Options				
Acceptable Alternative Formats: (Help) (control-click to select multiple formats)	Books Audiobooks			
Place Hold Cancel				

Title Level Holds - Staff and Patron

- Step 1: To place a "title level" hold that will capture all holdings attached to a single MARC record, staff member pulls up patron record and clicks on Holds and then Place Hold or patron logs into My Account.
- Step 2: Search and retrieve the item in the catalog.
- Step 3: Click Place Hold below the item record, fill out the Create/Edit a Hold form and click Place Hold

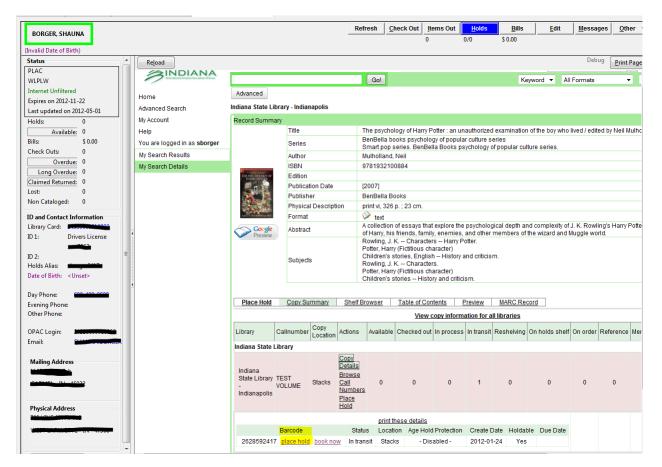
### Volume Level Holds - Staff only

- Volume level holds may be placed only by library staff. Volume level holds capture a specific call number.
- Staff may wish to place a volume level hold for the following case: a patron wishes to a specific volume of a circulating three part set of materials. For example, Adams Public Library System owns a 3 part set of North American Treaties. All three volumes are on the same catalog record. Selecting the item wanted by "call number," in this case "PR 949.5689 vol III" will ensure the patron gets the proper item.
- Step 1: From the staff client, staff member pulls up patron record and clicks on Holds and then Place Hold.
- Step 2: Search and retrieve the item in the catalog.
- Step 3: Click Place Hold in the Actions column, fill out the Create/Edit a Hold form and click Place Hold.



Copy Level Hold - Staff only

- Copy level holds may be placed only by library staff. Copy level holds capture a specific barcode number.
- Copy level holds would be used if a patron needed a specific issue of a magazine, or a specific date range of a travel guide, like Fodor's or Frommer's.
- Step 1: From the staff client, staff member pulls up patron record and clicks on Holds and then Place Hold.
- Step 2: Search and retrieve the item in the catalog.
- Step 3. Click "Place Hold" beside the barcode. The hold will be for this copy.





# Viewing Holds Queue

Patrons often would like to know their position in the holds queue. We do not recommend providing this information to patrons because our current holds configuration places holds on a proximity basis. This means that whoever is physically closest to an item will most likely receive the hold first. This system is designed to save money on transit costs since thousands of items transit across the state every year.

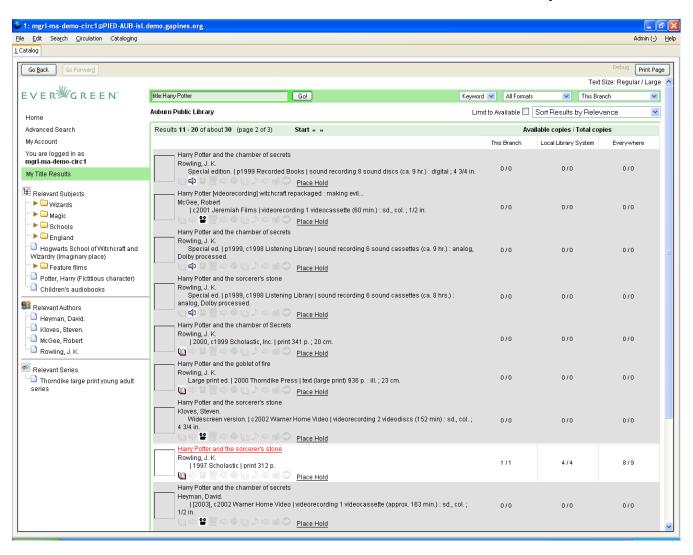
From the staff client, click "Search" and "Search the Catalog".



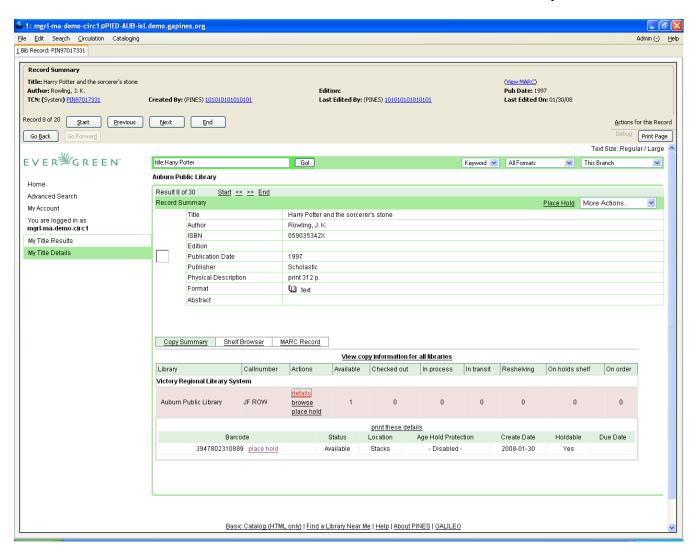
### Searching the Catalog

We will use the catalog to retrieve the barcode for the item in question. If you know the barcode, you may skip this step.

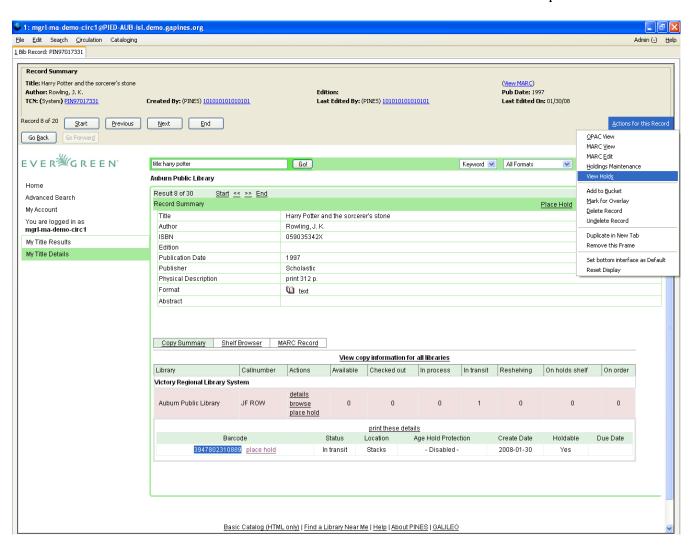
Search the catalog by title or by the search type of your preference to retrieve the item, in this case, *Harry Potter and the sorcerer's stone*.



After clicking on the title of the item in question, the Record Summary will appear.

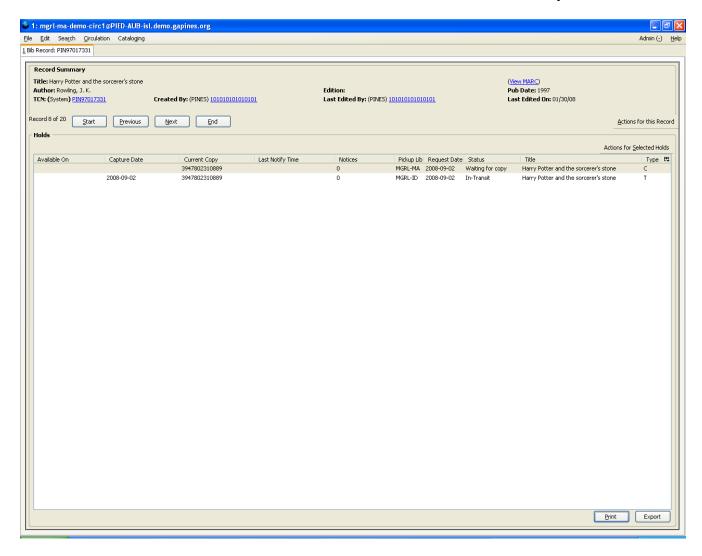


Next, click on "Actions for this Record" and "View Holds" to view the current holds queue.



The current holds queue will appear, as shown below. The default ordering is with the oldest hold (next in line) is at the bottom.

# Evergreen Indiana Circulation Training Manual Chapter 7 – Holds



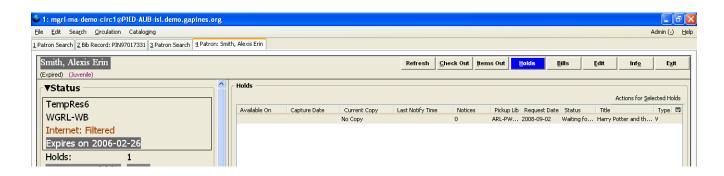


# **Cancelling Holds**

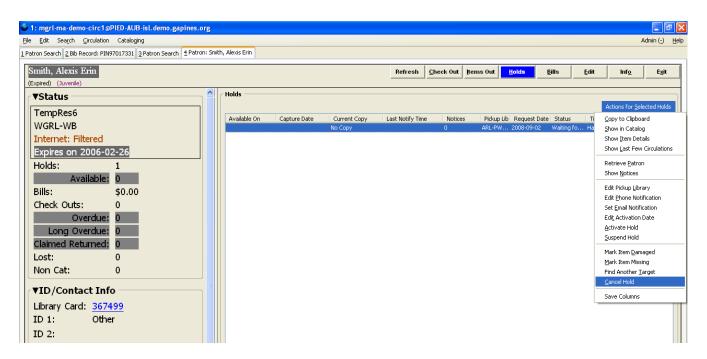
Often, a patron may call in and ask you to cancel a hold for them. While they can do this from the online OPAC, this may not always be possible for the patron.

To cancel holds from the staff client, first retrieve the Patron Account (See Item Checkout, Steps 1 through 4 for more information).

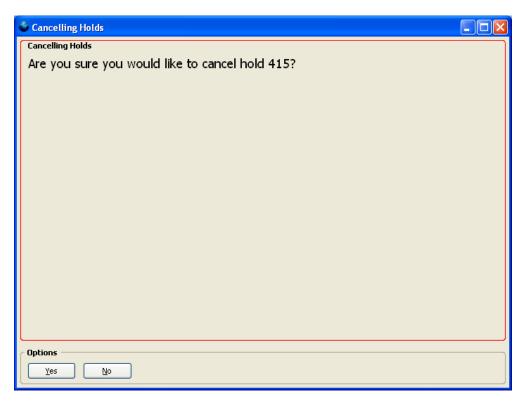
From the patron information screen, click "Holds" to view.



Any current holds will appear in the *Holds* window. To cancel a particular hold, select the line of the hold and click *Actions for Selected Items* and *Cancel Hold*.



The confirmation screen will appear.

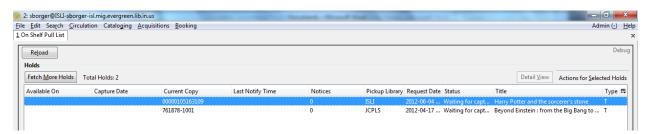


Select Yes to cancel the hold.

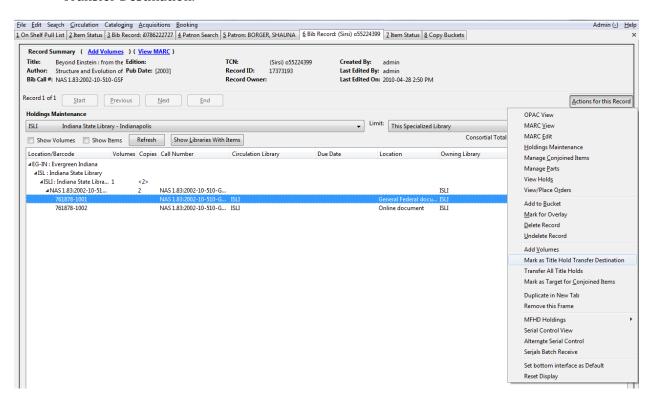


# Transferring holds in Evergreen

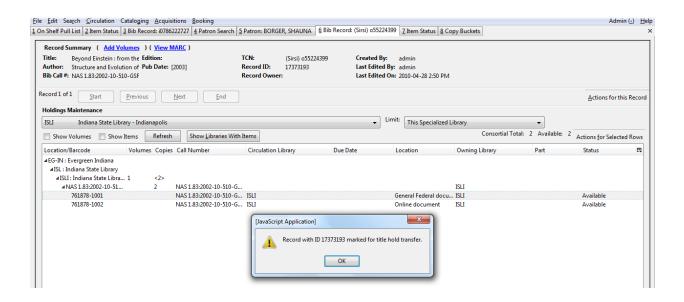
**1.** If you open the Pull List for Hold Requests and find that one item is damaged and you would like to circulate a different copy, you can transfer the hold to the desired copy.



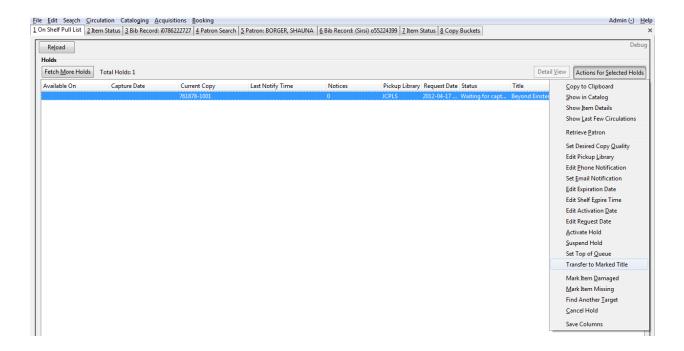
- **2.** Begin by opening a new tab (Control + T), pulling up the desired bibliographic record in the Advanced Search page, clicking on Actions for this Record and then Holdings Maintenance.
- **3.** Navigate to the correct library and then click on Actions for this Record > Mark as Title Hold Transfer Destination.

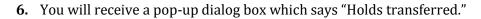


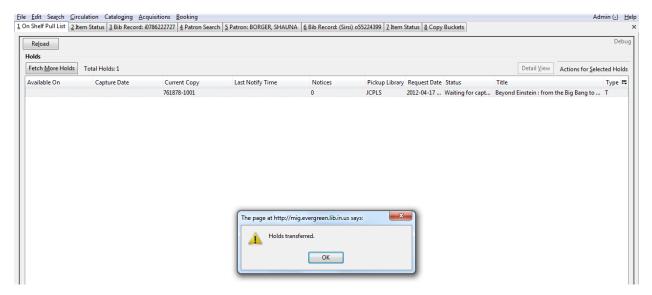
**4.** You will receive a pop-up dialog box which says "Record with ID [NUMBER] marked for title hold transfer.



**5.** Click back on the On Shelf Pull List tab, click on the hold you want to transfer, click on Actions for Selected Holds and then Transfer to Marked Title.







7. The holds list should reload automatically with the newly targeted copy for the hold.